

# GIVEBEQUEST



## CHALLENGE

We have been working in partnership with Community First Development (previously Indigenous Community Volunteers) since 2011. Part of their fundraising growth plan was to include Bequest calling in our campaign portfolio.

For the acquisition of new bequest prospects, Community First Development had traditionally relied on direct mail. Our brief was to work with the Bequest Manager to test the level of response that could be achieved using telemarketing channels.

## SOLUTION

Provide and test a range of data segments including Regular Donors, Cash Donors, and previous Bequest Prospects. We created a conversational call guide and utilised callers with excellent active listening skills that would best suit the older demographic. We included questions about the supporters' motivation relating to their stated Bequest intentions. CFD also created a new, tailored supporter journey with follow-up from their Bequest Coordinator.

## RESULT

After achieving a 60% contact rate, we saw 35% conversion to positive outcomes, which were defined as Committed, Intending, and Requested More Information. All 3 data segments exceeded the expected conversion KPIs; with Regular Donors double the target and those who'd identified as Interested tripling the conversion KPI. Almost 50% of the Committed responders, largely previously unknown as Bequest prospects, have subsequently confirmed they will be leaving a Gift in Will.



## AT A GLANCE

### Challenge

- Connect with supporters to gauge their willingness to give a GIW
- Provide an update to supporters who've indicated they intend to leave a GIW

### Result

- **35%** conversion to a positive outcome
- Regular Donors achieved **double** the target KPI
- Previous Intenders achieved **triple** the target KPI
- Almost **50%** of Committed responders have confirmed their GIW



*"GiveTel provided their telemarketing services to help us achieve our targets in our Gifts in Wills program. Their services provided an effective way to connect with our supporters and engage with them on a personal level. They clearly understood our needs and objectives and made it easy for us to track activity and monitor results so we could easily calculate our return on investment. Their skilled callers provided the right message in a professional way and achieved most pleasing results."*

**Alicia Edwards, Community First Development**